CM/ECF Version 5.1.1

A Guide to the New Features Available to Attorneys and Law Firm Staff

United States District Court
Western District of Oklahoma
May 20, 2012
CM/ECF Version 5.1.1

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Version 5.1.1 Enhancements & Changes

NEW PASSWORD REQUIREMENTS

CM/ECF now requires users to create more secure passwords. Passwords must be at least eight characters long and include both uppercase and lowercase alphabetic characters and at least one digit or special character (for example, 0-9, @, #, $, %, &, *, +).

After logging in with your current password, a pop-up message will instruct you to change your password.

IMPORTANT:
Please be sure to change your password right away. Although it is possible to bypass this screen, failure to update your password may eventually result in your being locked out of your account.

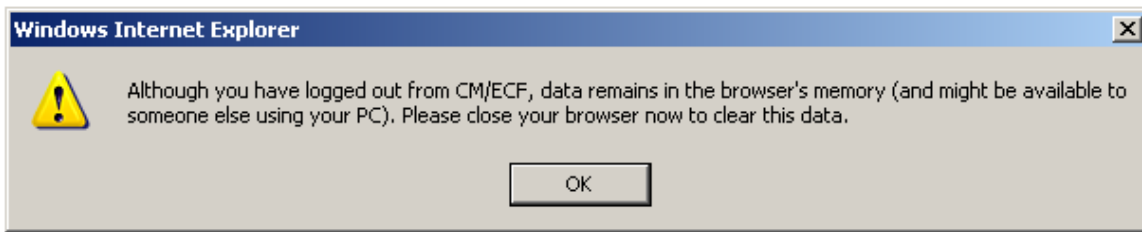Pop-up Message Instructing User to Change Password

LOGGING OUT OF CM/ECF

IMPORTANT NOTE: When exiting CM/ECF, use the Logout button in the blue menu bar. Users who exit the browser without first logging out have experienced difficulty logging in.

When you click Logout from the main blue menu bar, the following pop-up message will appear. Click OK to complete the logout.

Windows Internet Explorer

⚠ Although you have logged out from CM/ECF, data remains in the browser's memory (and might be available to someone else using your PC). Please close your browser now to clear this data.

OK

NEW CIVIL COVER SHEET

The new civil cover sheet can be found on the Court's website, www.okwd.uscourts.gov/forms.htm . The following changes were made to the Civil Cover Sheet:

Nature of Suit
367   TORTS - Personal Injury - Health Care/Pharmaceutical Personal Injury/Product Liability
375   False Claims Act
448   Civil Rights – Education
560   Prisoner Petitions - Civil Detainee - Conditions of Confinement
751   Labor - Family and Medical Leave Act
896   Other Statutes – Arbitration
899   Other Statutes - Administrative Procedure Act/Review or Appeal of Agency Decision

Additionally, the following codes were eliminated from the Civil Cover Sheet:

444   Civil Rights – Welfare
610   Forfeiture/Penalty – Agriculture
620   Forfeiture/Penalty - Other Food & Drug
630   Forfeiture/Penalty - Liquor Laws
640   Forfeiture/Penalty - RR & Truck
650   Forfeiture/Penalty - Airline Regulations
660   Forfeiture/Penalty - Occupational Safety/Health
730   Labor - Labor/Mgmt Reporting and Disclosure Act
810   Other Statutes - Selective Service
875   Other Statutes - Customer Challenge 12 USC 3410
892   Economic Stabilization Act
894   Other Statutes - Energy Allocation Act
900   Other Statutes - Appeal of Fee Determination Under Equal Access to Justice Act

CHOOSING PARTIES

During the filing process, you are asked to choose which party is filing the document. Selecting the parties from the pick list will cause the names to be entered in the docket text.

Selecting the radio button for a group will cause the group to be entered in the docket text.

Docket Text: Modify as Appropriate.

[▼]   **MOTION for Attorney Fees** [_____]   by **All Defendants** , (attorney1,)

[Next]   [Clear]

If you are filing on behalf of a group with more than 2 or 3 parties, please use the radio button to select the group.
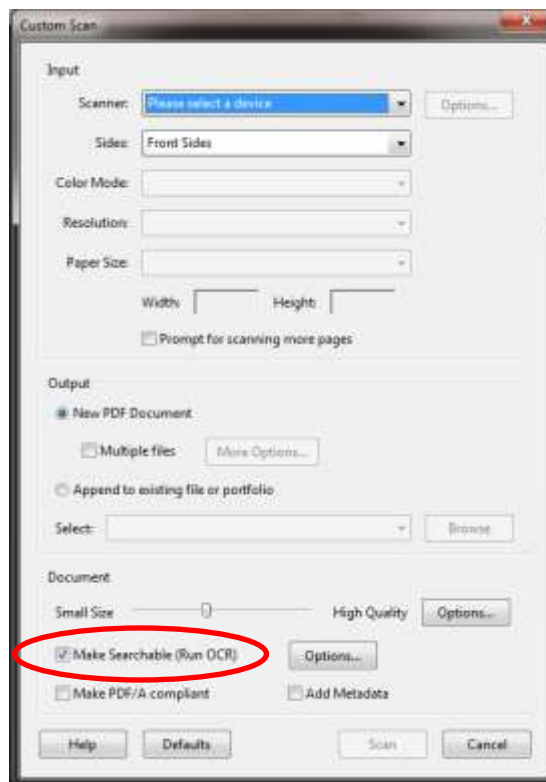
TEXT-SEARCHABLE DOCUMENTS

Court staff is now able to run full-text searches in the Western District ECF database. Search options include text within documents and docket text. This court strongly encourages you to save all documents as text-searchable.

Creating a Text-Searchable Scanned Document using Adobe

Scanned documents containing typewritten text should be text-searchable. You will need to activate the Optical Character Reader (OCR) in the PDF software. To set the scanner to read the text, follow these steps:

1. Open Adobe Acrobat Professional.

2. Select the **Create** icon.   [Create ▼]
3. Choose **From Scanner**.
4. Choose **Custom Scan**.
5. On the Custom Scan dialog box, check **Make Searchable (Run OCR)**.

Adobe will remember this setting and will run OCR on all future scans. If you do not want to run OCR on a document, uncheck the box.

Save a Word Document as aText-Searchable PDF

1. Click the **File** tab.
2. Click **Save As**.
3. In the **File name** box, type a name for the file.
4. In the **Save as** type list, select PDF.
5. You can compress the file size by clicking **Minimum size (publishing online)** next to **Optimize for**.
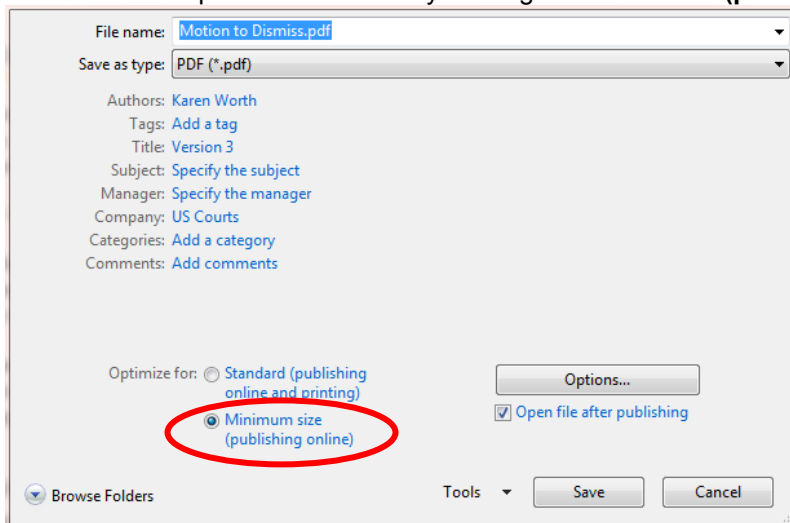
6. Click the Options tab if you need make special selections.
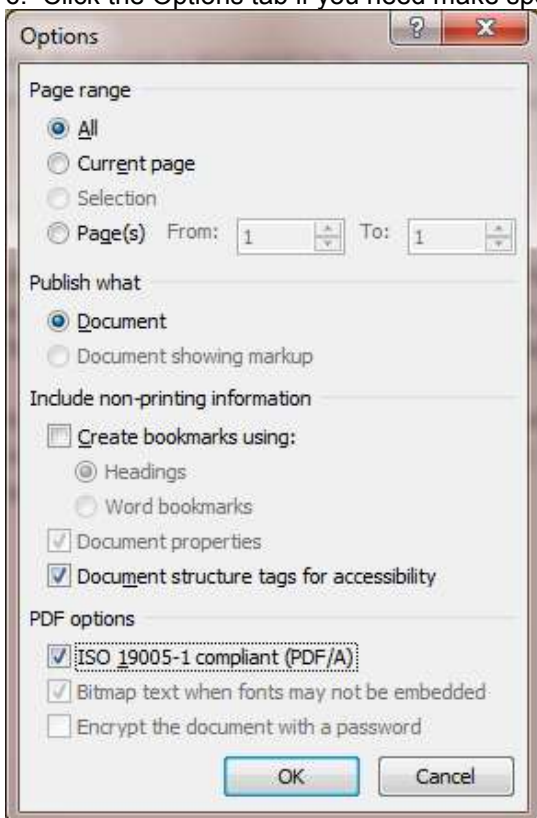
7. Click **OK**.
8. Click **Save**.

Save a Word Perfect Document as aText-Searchable PDF

1. Click **File >Publish to PDF**.
2. Choose the drive and folder where you want to save the file.
3. Type a filename in the **File name** box.
4. From the **PDF style** list box, choose one of the following options:
   • **Commercial printing (Largest file size)** — creates a high-quality PDF to send to a printer or digital copier
   • **PDF/A-1a (Level A compliance)** — creates a standardized PDF file that ensures the long-term archiving of the document. This option allows document tags and font encoding to be preserved. (see section "PDF/A below")
   • **PDF/A-1b (Level B compliance)** — creates a standardized PDF file that ensures the long-term archiving of the content. This option does not include the preservation of document tags and font encoding.
   • **Publishing online (Smallest file size)** — creates a PDF suitable for online viewing, such as a document to be distributed by e-mail or displayed on the Web
   • **Publishing online and printing** — creates a PDF suitable for viewing or printing on a laser or desktop printer
5. Click **Save**.

If you do not want the PDF file to open automatically after it is saved, disable the **Open PDF after saving** check box.

PACER ACCESS CHANGES

MDL Case Report Query

The Query menu includes the new MDL Case Report query. All cases associated with the same JPML (Judicial Panel on Multidistrict Litigation) number as the target case will be listed, sorted by case type, (descending so **md** case type sorts before **cv**) and case number. When the MDL Case Report is run, the user can determine whether all MDL-related cases or only pending MDL-related cases should display. The use of this feature is at the discretion of each court.

Civil Cases Report

The Civil Cases Report now includes a *JPML number* field on the selection criteria screens, so the report can be run by JPML (Judicial Panel on Multidistrict Litigation) number.

Query

When a query is run for a multi-defendant criminal case, the defendant numbers for the selected defendants now are included with the case number at the top of the query menu screen. If all of the defendants are selected, or if the main case is selected, the words **All Defendants** will appear beside the case number in lieu of the actual defendant numbers.

When the user runs a query on a person name, that name now is included at the top of the screen that lists all of the cases in which that person is a participant. The person's role is included at the top of the screen as well (for example, "**Nicolas Mercator is an attorney in 6 cases.**"). Additionally, a summary of selection criteria used for the query now appears at the bottom of the case list screen; however, if the query is run on a case number alone, the summary of selection criteria will not appear.

Docket Report

The *Sort by* dropdown list on the Docket Report selection criteria screen now includes a **Document number** option. If selected, those entries without document numbers will appear chronologically within the entries that do have document numbers.


WRITTEN OPINION REPORT

The Written Opinions Report allows users to search for written opinions. Written opinions are judgments, opinions, and selected orders in Social Security appeals cases. R&Rs that have been adopted by orders marked as written opinions also are available to PACER users. This report is free to PACER users.

Users can search by case number, last name, first name, middle name, office, nature of suit, case type, cause of action, and case flags for a specific date range. The report can be formatted to return either full docket text or summary text and may be sorted based on case number or filed date.

The public is not charged for viewing documents that are flagged as written opinions; the Written Opinions Report is free for PACER users. PACER users also can access opinions via other reports and queries, such as the Docket Report, and will not be billed for accessing the written opinion document itself, but will be billed for the report or query used to identify the document. For example, if a PACER user runs a Docket Report, the user will be charged for the docket report (as usual). If the user then clicks on the document number hyperlink for a written opinion document, the user will not be charged for viewing the document.

If a PACER user views a written opinion document, there will be no PACER billing receipt on the screen since there is no charge. Further, viewing a written opinion document will not result in an entry in the Review Billing History report. An entry will be made in the Billing Transaction log file with "opinion" in the description field and the number of pages in the page count field.
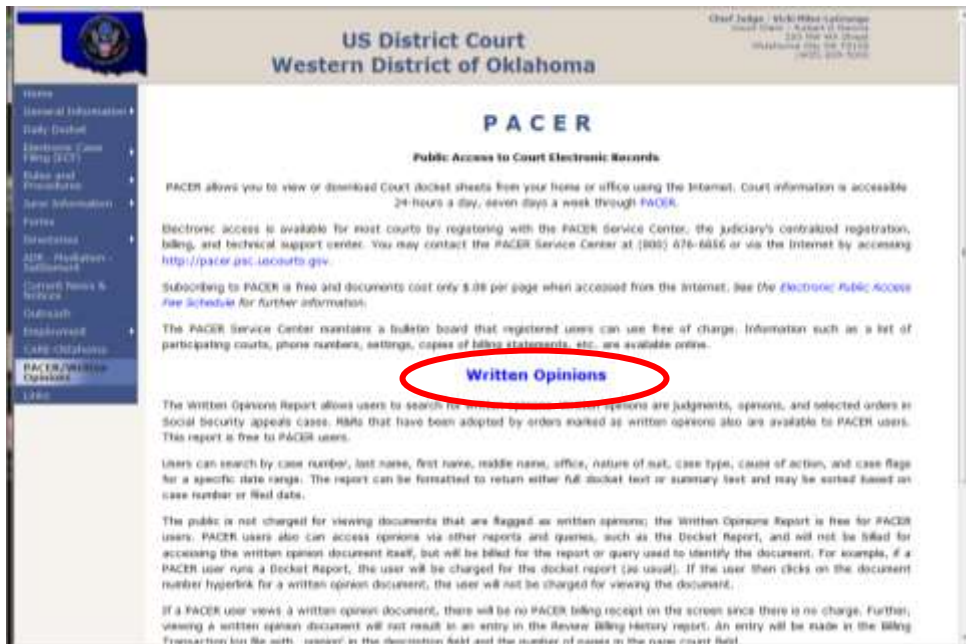
FOLLOWING CASES

<u>Maintain Your Email Preferences</u>

When a party is dismissed or otherwise terminated from a case, counsel is also terminated and noticing of future Notices of Electronic Filing (NEF) is turned off. Noticing of the NEF is also turned off when counsel is allowed to withdraw from a case.

Counsel has the ability to follow cases of interest by receiving an NEF when a document is filed in the case. Counsel need not be admitted in the case to receive these notices. Counsel's name will not appear on the public NEF.

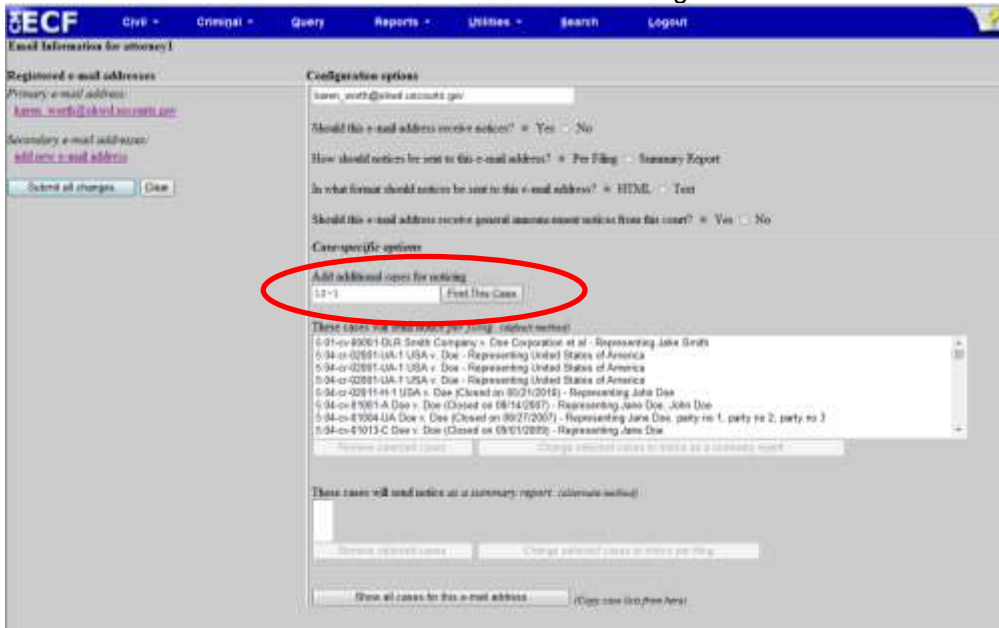Standard PACER billing rates will apply for viewing the document.

> To follow a case, log in using the attorney's ECF login and password.
> Click on Utilities.
> Click on Maintain Your E-mail.
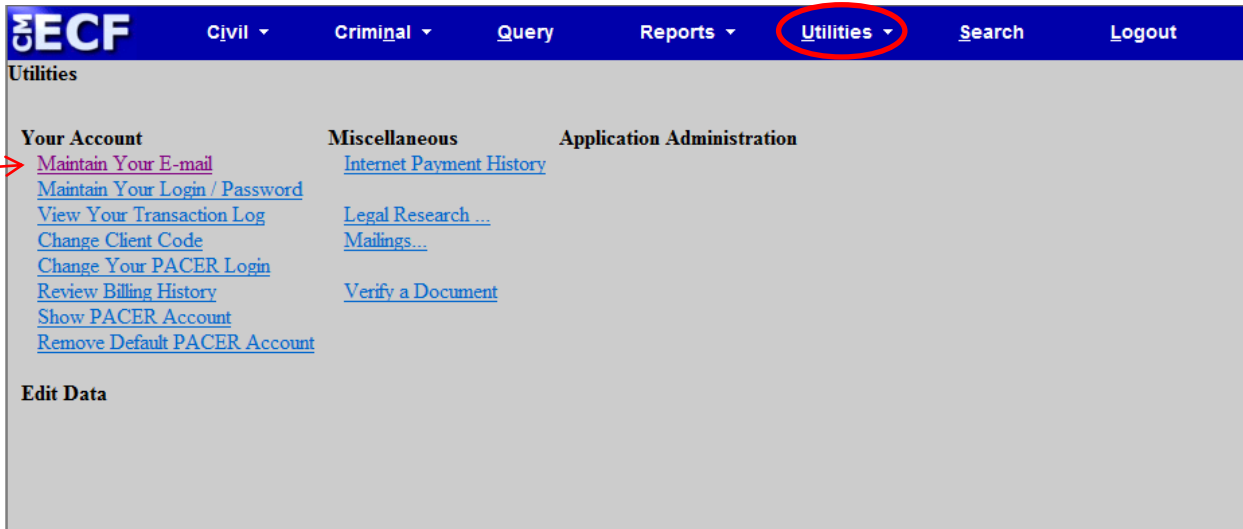
Click on the primary email address.
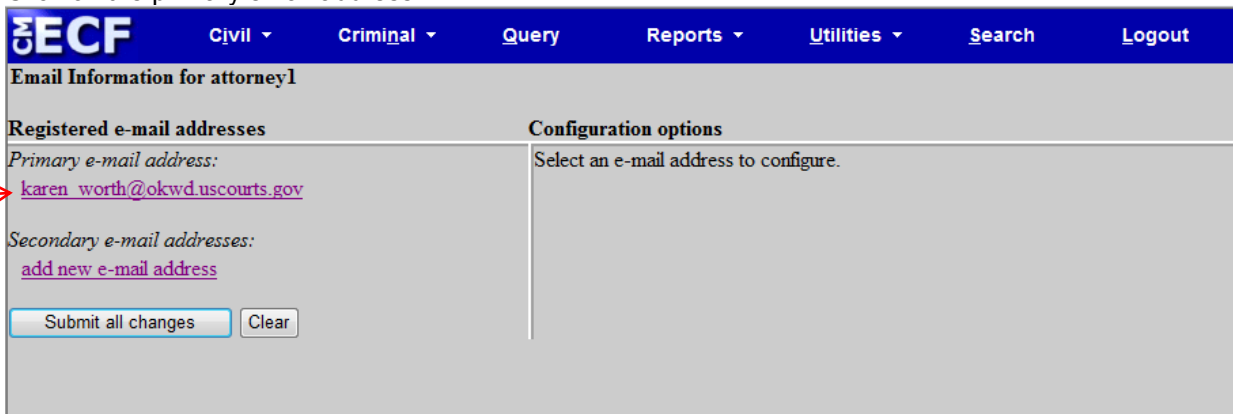
Add the case number to "Add additional cases for noticing" and click "Find This Case."

Choose the case and click "Add case(s)."

To remove a case from the list, select the case (use "Ctrl" to select multiple cases) and click "Remove selected cases."

RSS Feed

RSS (Really Simple Syndication) is a format for delivering regularly changing web content. An RSS document, also referred to as a "feed," typically includes summarized text with links to full versions. These feeds allow users to stay informed about any changes on a web site. The PACER RSS feed contains information such as upgrades to local courts CM/ECF software and PACER announcements.

Look for the RSS icon on the PACER court links page (www.pacer.gov/psco/cgi-bin/links.pl) to identify the courts providing the notification. Click on the link and you will see a list of the court's cases, by case number and name, with a brief text description of the most recent activity and the time it occurred. The cases can be sorted by date and by title.

Users can also access the RSS feed for the Western District of Oklahoma by selecting the "Court Information" link on the ECF home page.

Subscribe to the RSS and updated information from the court's feed is automatically downloaded to your electronic device. If users are logged into PACER, the feed can take them directly to the case record. Only when a logged-in user views a PACER document or a docket report is a fee incurred.

A feed reader or news aggregator, which are available free for downloading online, let users select individual cases from an RSS feed, so only that case information is delivered. Users can change the frequency with which they receive updates, from every few minutes to daily.